

CLAIMS

I/We claim:

- [c1] 1. A method in a computer system for defining a forecast snapshot, the method comprising:
- receiving from a user an interval for creating forecast snapshots;
- receiving from the user a day within the interval for creating forecast snapshots;
- receiving from the user roles of participants to be included in the forecast snapshots;
- notifying the participants of the creation of a forecast snapshot so the participants can update their forecast information; and
- generating a forecast snapshot based on the opportunity information of the participants in accordance with the day within the interval.
- [c2] 2. The method of claim 1 wherein the interval is weekly.
- [c3] 3. The method of claim 2 wherein the day is a day of the week.
- [c4] 4. The method of claim 1 wherein the interval is monthly.
- [c5] 5. The method of claim 4 wherein the interval is a day of the month.
- [c6] 6. The method of claim 1 including before generating a forecast snapshot, ensuring correctness of a hierarchy of the participants.
- [c7] 7. The method of claim 6 including when the hierarchy of participants is not correct, notifying a user so the hierarchy can be corrected.

- [c8] 8. The method of claim 1 wherein the generating includes
for each participant, retrieving opportunity information for that participant;
and
generating forecast summaries in accordance with a hierarchy of the
participants.
- [c9] 9. The method of claim 1 wherein each forecast snapshot is associated
with a forecast period.
- [c10] 10. The method of claim 9 wherein the forecast period is a quarter.
- [c11] 11. The method of claim 9 including receiving from the user an
indication of the forecast period.
- [c12] 12. The method of claim 1 wherein the forecast snapshot is
automatically generated based on the day and interval.
- [c13] 13. A computer system for defining a forecast snapshot, comprising:
a component for receiving from a user a schedule for creating forecast
snapshots;
a component for receiving from the user an indication of participants to be
included in the forecast snapshots;
a component that automatically generates a forecast snapshot based on
the opportunity information of the participants in accordance with the
schedule; and
a component that sends an alert to the participants that a forecast
snapshot has been created so the participants can update their
forecast information.

- [c14] 14. The computer system of claim 13 wherein the schedule is based on a user-defined interval.
- [c15] 15. The computer system of claim 13 including a component that, before generating a forecast snapshot, ensures the correctness of a hierarchy of the participants.
- [c16] 16. The computer system of claim 15 including a component that, when the hierarchy of participants is not correct, notifies a user so the hierarchy can be corrected.
- [c17] 17. The computer system of claim 13 wherein the component that generates the forecast snapshot includes:
 for each participant, retrieving opportunity information for that participant;
 and
 generating forecast summaries in accordance with a hierarchy of the participants.
- [c18] 18. The computer system of claim 13 wherein each forecast snapshot is associated with a forecast period.
- [c19] 19. The computer system of claim 13 wherein participants are indicated by their roles.
- [c20] 20. A computer-readable medium containing instructions for controlling a computer system to define a forecast snapshot, by a method comprising:
 receiving from a user a schedule for generating the forecast snapshots;
 receiving from the user an indication of participants to be included in the forecast snapshots; and

automatically generating a forecast snapshot based on the opportunity information of the participants in accordance with the schedule.

[c21] 21. The computer-readable medium of claim 20 wherein the schedule is based on an interval.

[c22] 22. The computer-readable medium of claim 21 wherein the schedule specifies a day within the interval.

[c23] 23. The computer-readable medium of claim 21 wherein the participants are indicated by their roles within an organization.

[c24] 24. The computer-readable medium of claim 21, including before generating a forecast snapshot, ensuring the correctness of a hierarchy of the participants.

[c25] 25. The computer-readable medium of claim 24, including when the hierarchy of participants is not correct, notifying a user so the hierarchy can be corrected.

[c26] 26. The computer-readable medium of claim 21 wherein generating the forecast snapshot includes:

for each participant, retrieving opportunity information for that participant;
and
generating forecast summaries in accordance with a hierarchy of the participants.

[c27] 27. The computer-readable medium of claim 21 wherein each forecast snapshot is associated with a forecast period.